



ODT Rentals 365

North America

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What's New

- **Rental Report Selections**
The Rental Report Selection provides the ability to specify the report to be used for printing a rental quote, rental contract, proforma invoice, rental delivery, rental return, and posted rental invoice.
- **Send and/or email rental documents**
The capability to send and/or email the rental documents, excluding the proforma invoice, has been added to the rental quote, rental contract, posted rental delivery, posted rental return and posted rental invoice cards.
- **Integration with Jobs**
The integration with Jobs includes, the ability to reference a Job No. on a rental contract, along with a Job Rental Contracts fact box on the Job card, which displays all the contracts that have the Job No specified. On the Jobs, a Job Planning Lines Ready for Billing has been added where selected planning lines can be appended to an open rental contract, sales lines. Or new contract can be created and the planning lines added to the new contract sales lines. When the contract sales lines are invoiced, the applicable Job Planning Lines are updated, and the applicable Job Ledger Entries are created.
- **Inventory transfers to Fixed Assets**
The Inventory transfers to Fixed Assets automatically creates Rental Units within a rental group and Fixed Assets using a selected FA Template based on the quantity specified. The Fixed Assets will automatically be linked to the rental units created.
- **The copy Rental Unit feature has been modified to provide the ability to override the New Rental Unit No. field.**
- **Rental Revenue Accrual and Deferral**
The feature provides the ability to accrue the rental revenue for the rental price and periodic usage and standby prices when the rental period spans an accounting period end. The deferral of the revenue is optional. A Rental Accrual Journal has been added, which is an automatically reversing journal based on settings on the Rental Management Setup.
- **Customer instructions**
The Customer instruction feature provides the ability to specify instructions on the customer card, rentals tab, which flow to the rental quote and contract, general tab when the customer is selected. The instructions can be viewed from the quote and contract, General tab, Rental Instructions field.
- **Rental Unit Sales report**
The Rental Unit Sales report provides the ability to filter by category and rental unit group. The report details provide the sum of rental revenue by rental contract, customer number and the number of days rented. The report groups the records based on the filters set and provides a report total.
- **Suggest Sales price field has been added to the rental unit card.**
The suggested sales price is displayed on the rental unit statistics. The suggested sales price can be set on a rental unit group and will be displayed on the rental units', rental unit statistics page.
- **The Rental Unit Statistics has been enhanced to be available for all units.**

- **The Rental Unit list sorting has been modified so that any rental units assigned to a group will be displayed below the rental unit group in alphanumeric order.**
- **The Rental Ledger Entries have been enhanced to provide the ability to add the Temporary Location and Return Bin Code field using personalize.**
- **The Completed Rental Contract has been modified to enable adding of attachments to the contract header and lines.**
- **The Rental FA Transfer Journal has been modified to allow the Expected Receipt Date-Time to be different than the Shipment Date-Time.**

NOTE:

For additional details on the above modifications and new enhancements, please review the ODT Rental Online Help. The help can be accessed from the Business Manager and Sales Order Processor role centers, under Rental Management in the Actions section of the role centers.

Issues Resolved

- The Rental Amount Line, Ending Date-Time is incorrect when on the Rental Calendar when multiple days flagged as Non-Billable, follow a day that has Use Standby Price flagged.
- On the Rental FA Transfer Journal users were unable to change the selected FA No. when an incorrect FA No had been selected.
- On the Rental FA Transfer Journal the Rental Temporary Location field was not available to add to the journal lines. And a transfer to a temporary location was allowed without entering the information on the location in the Rental Temporary Location field on the journal.
- When processing contracts where the Customer or on the contract had a FCY Currency Code, then the Damages Waivers records were not generated on the Rental Amount Lines when the Rental Price card had Damage Waivers configured.
- The Rental Return Date could not be cleared on the Rental Group Line.
- When running the Make Contract on a Rental Quote where the Rental Start Date or Rental Return Date had been modified, then the dates on the Rental Contract lines were reset to the defaulted dates.
- When running the Make Contract on a Rental Quote that contains a Rental Package, the component lines Rental Unit Price were reset to the unit prices. The allocated prices were not flowing through to the Rental Contract Lines.
- When a different Rental Term was entered on the Contract Header after enter the Rental Lines, then an error occurred when exiting the contract.
- When posting the invoice on a contract, the Location Code on the Rental and Sales Lines on the contract was not flowing through to Sales Invoice sales lines. The sales lines Location Code was being set to the Location Code on the Sales Invoice header.

- When on a Rental Line, the Bin Code was greater than 10 characters an error occurred when the unit was shipped. And when the unit was linked to an Item, the Transfer Order was posted when should not have been.
- When on Rental Management Setup the Default Blank Return was enabled and Copy Document was ran without entering a Return Date an error occurred and the document was not copied.
- When using Periodic Usage pricing and the Rental Unit on the Rental Line is linked to an Item if the Rental Quantity on the Rental Line was greater than 1, then the Rental Amount Line Extended Quantity was only being populate with a quantity of 1.
- The Expand and Collapse feature on the Rental Line issues when adding or delete a Rental Unit or group when the lines are collapsed and then expanded have been addressed.
- When printing the Posted Rental Invoice where there are or were multiple units invoiced, and the Show Rental Details was not enabled, then on the invoice only the first unit prints with the Total Price being the sum of all the units invoiced.
- When copying a Rental Contract that has a group with a sub-rental unit, then a warning message occurred advising that the sub-rental unit was not copied to the new document as it does not allow overbooking and is currently reserved or on rent.
- When using the Rental Calendar and the Return Date is blank on the Rental Line and select Next Period an error occurred.
- When using Day pricing terms that have Tracking Date and Time specified in conjunction with using the Rental Calendar to specify a day as Use Standby Price, then on the Rental Amount lines for the Standby Price the Ending Date-Time was being set to be for 2 days rather than 1. If the term had the Summarize Rental Line enabled an a day in the rental calendar was set as either standby or non-billable, then the Rental Amounts Line would not be included for 2 days.
- When processing a partial return when the Rental Contract has a Foreign Currency Code on the header and rental lines, then an error occurred.
- Users were not able to perform a rental swap more than once after invoicing a rental period as an error occurred.
- When using the rental calendar to specify non-billable days and days to use the standby price and then perform swapping of rental units, then the rental calendars on both the initial unit and new unit had the swap date record. If the swap was performed on the Rental Return Date then the Rental Start Date on the Rental Line for the new unit was set to a date later than the Rental Return Date.
- When using Periodic Usage and rental pricing for a day term that has Summarize Rental Lines enabled, the grouping of the Rental Amount Line for the rental price were modified when the Periodic Usage calendar had days set to Periodic Usage or Standby.
- When using Periodic Usage pricing with multiple rental quantity on a contract and the invoice posted for a rental period, then a partial return done on the same date, when invoicing the second period for the remaining rental quantity on rent the pop-up message still occurs for the units which were returned and had been fully invoiced.

Known Issues

- When an item is entered on the sales line of a rental quote or contract and does not have any special discounts or prices, then the Item Unit Price does not populate the Unit Price Excl. Tax field. If an item is entered that does have a special price with a quantity condition, then the special price populates the Unit Price Excl. Tax field, even if the condition is not met.
- When Sales Lines are entered on a Rental Contract, prior to looking up and selecting a rental unit or group on the Rental Lines, then the message, Do you want to rename the record?, will occur. Whether yes or no is selected, the Rental Unit No. does not populated the rental line. However, if the user moves down 2 lines below the last entered sales line, prior to looking up and selecting the Rental Unit on the Rental, then the message does not occur and the Rental Unit No. populates the Rental Line.
- Swapping rental units when the term has an invoicing type of periodic start and the rental period is greater than a day term (week, month), after an invoice has been posted, and then a swap is ran with a date that is during the period that was invoiced has an issue. The rental amount lines on the new rental unit are incorrect. This issue only occurs when the rental pricing includes periodic usage and standby charges.
- When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.
- The Unit Avail. Matrix, Reserved Qty. field is not updating when the selected unit line has a reservation entry.
- When on the Unit Avail. Matrix the user has set an Attribute with Value filter and closed the Filter Rentals by Attribute page and the lines have been filtered, and then go back into the Filter Rentals by Attribute page and clear the Value field and close page. The Attribute Filter is blank, but lines are not updated as the lines are still filtered by the attribute and attribute value. When go back into the Filter Rentals by Attribute page there are no records displayed. In order to get the lines to display without the filters, the user must add back the Attribute and Value in the Filter Rentals by Attribute page, select ok and then delete the data in the Attribute Filter field in the matrix options.
- When a Fixed Asset is linked to a Rental Unit and either on the unit or asset the Rental Location is changed from a temporary Location, the Temporary Location field is not cleared on the asset card. On an asset card when the Rental Location is changed to a temporary location the Temporary Location field cannot be edited.
- The Rental Inventory Availability, Location Filter field does not display the entered or selected Location. The setting can only be cleared by using the Filter option and clearing the Location filter. The Rental Avail. Inventory quantity does not include the quantity that has been returned when the contract has been completed and is closed.
- When a customer does not have a Ship-to-Code, and the rental and sales lines are populated prior to entering the Ship-to-Code on the header, then errors occur. Selecting revert the changes does not clear the Ship-to Code field, and if close the contract, then the same errors occurs. If clear the Ship-to-Code field and close the contract, then the message, "There are unsaved changes on the page. Do you want to discard these changes?" occurs.

- When the Rental Return Date on the rental line is blank, and after adding the Rental Billing End Date to the lines and enter a date in the field, an error occurs when try to clear the date.
- On the Rental Contract, if all the rental lines are deleted, then on the General tab the Contract Total and Amount Outstanding fields are not cleared.

UPCOMING Releases – Planned Modifications and New Features

- **Add Shipping feature on rental contract lines & To Ship list page, including:**
 - Pick-up Location & address with options to select internal location, vendor location or manually enter the address to picked up the unit.
 - Ship-to Location & address for customer location or manually entering address.
- **Add Return feature on rental contract lines & To Return list page, including:**
 - Pick-up Location & address with options to select customer location or manually enter the address to picked up the unit to be returned.
 - Return-to Location & address with options to select internal location, vendor location or manually enter the address to return the unit to.
- **Multiple meters for Rental Units**
- **Avalara tax integration**
- **Add EOM/BOM options on rental terms**
- **Auto credit for early return of start and periodic start billing rentals**
- **Deposit capability**
- **Putting a Rental on Hold**
- **Recurring Sub-Rental PO feature**
- **Undo Return feature**
- **Enhancement of the Group Availability Matrix to have Category and Attribute filters in the Options**
- **Metered Usage enhancement for Optimization and/or Proration of Metered Usage Allowance Limits**
- **Enhance the To Ship and To Return lists to add the ability to enter Metered Usage Qty. or Current Meter Reading**